

# Golden West Region Soroptimist International of the America's, Inc.

# 2016-2017 Club Officer's Checklist



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and members new bank ant signature & get ox key Live Your n Applications aformation on	www.soroptimist.org: Remember, your bank will need a copy of club business minutes listing names of new officers Download a Live Your Dream order form and Dream It, Be it: Career Support for Girls Toolkit at	Assignments to chairs New president, treasurer & secretary to sign bank account signature cards Give application forms to Live Your Dream to committee
Int signature & get ox key Live Your n Applications Iformation on	business minutes listing names of new officers Download a Live Your Dream order form and Dream It, Be it: Career Support for Girls Toolkit at	secretary to sign bank account signature cards Give application forms to Live Your Dream to committee
n Applications Iformation on	Dream It, Be it: Career Support for Girls Toolkit at	Your Dream to committee
it Club ership Forms & 5010) and GWR	Complete and submit Membership forms to <b>SIA and GWR</b> Download GWR forms from: <u>http://www.goldenwestregion.org/</u>	Ensure Club Treasurer completes and mails membership change forms to both SIA and to GWR Treasurer within 30 days of
it Club Dues	Complete SIA forms online or download forms from www.soroptimist.org	member induction, transfer c termination
it SIA Form Report of New Officers	Complete and submit Report of New Club Officers online to SIA at <u>www.soroptimist.org</u>	Ensure this list is completed and submitted as soon as club officers are identified.
it GWR form of Club Officers	Submit club president and club treasurer contact information to the GWR Secretary in the format identified	
it Program Reports	Do not wait – report on each project as soon as completed!	Reports submitted online by April 15 may be considered
	To enter your Program Focus Report for SI, visit http://reports.soroptimistinternational.org.	for an award for club service fund that may be presented a Spring Conference.
it Soroptimist rating Success	Soroptimist Celebrating Success recognizes outstanding club projects and best practices in each of the four areas of the SIA Strategic Plan: program, members, public awareness, and fundraising. Get forms and instructions at <b>GWR website</b> <u>http://www.goldenwestregion.org/</u>	Send to SCS Chair DONA Linda Nixon September 30, 2016 (changed from the SIA suggested date of July 1 <sup>st)</sup>
	Submit projects or practices started or completed during the 2014-2015 calendar year	
		sing Successoutstanding club projects and best practices in each of the four areas of the SIA Strategic Plan: program, members, public awareness, and fundraising. Get forms and instructions at GWR website http://www.goldenwestregion.org/Submit projects or practices started or completed

	Download planning	Dwnload planning         The following documents are available from           ilendars from SIA         www.soroptimist.org:	Keep these handy, as	
	Website	2016-2017 Club Calendar of Events	members will be asking you for this information Share with your board and	
		Club President Planning Calendar	committee chairs as applicable	
		2016-2017 Program Quick Reference Guide		
	Send news release announcing new club officers to local media	A variety of resources related to publicity and public awareness are available for download from <u>www.soroptimist.org</u> :	Send to local newspaper(s) Chamber of Commerce	
	Hold a club planning retreat	The <b>SIA website</b> has many excellent resources available for download at <u>www.soroptimist.org</u> : •Keeping the Balance For Clubs • Skills and Talents Assessment Tool •Club Assessment Form Sample •Club Strategic Plan Template •Club Award Form •Event Ideas: Successful Fundraisers •Project Evaluation Form •Public Awareness Checklist •Recruitment Manual •Retention Manual •Welcoming New Members	Assign a committee to help with the retreat	
<u>_</u>	Submit Club Membership Forms (5008 & 5010) to SIA and GWR	Accepting new members is an ongoing activity! Complete and submit Membership forms to <b>SIA and</b> <b>GWR</b> Download GWR forms from <u>http://www.goldenwestregion.org/</u>	Ensure treasurer completes forms for new member and member changes	
		Complete SIA forms online or download forms from www.soroptimist.org:		
	Submit Program Focus Reports	Submitting Program Focus Reports is an ongoing activity! Refer to July for details.	Due online by April 15	
]	Submit Soroptimist Celebrating Success	Soroptimist Celebrating Success recognizes outstanding club projects and best practices in each of the four areas of the SIA Strategic Plan: program, members, public awareness, and fundraising. Get forms and instructions at <b>GWR website</b> <u>http://www.goldenwestregion.org/</u>	Send to SCS Chair DONA Linda Nixon <mark>September 30</mark> 2016	
		Submit projects or practices started or completed during the 2015-2016 calendar year		

7	P T E M B E R Register for District	The Call to your club's District Fall Meeting will be issued via	Send Registration to
	Fall Meeting	email between mid-August & mid-September depending upon the date of the meeting.	District Fall Meeting Registration Chair per instructions in Call
	Distribute Live Your Dream applications	Download for Live Your Dream Program resources from SIA website www.soroptimist.org:	IMPORTANT DATES:
			Live Your Dream applications to Club- November 15
			Live Your Dream Winne to GWR District Committee Rep.— February 1
_	Dream It Be It	Begin to develop a planning committee for Dream it , Be It	Be prepared to report
_	Program for Girls	Program for Girls, see Toolkit at <b>SIA website</b> www.soroptimist.org	your progress by February 15, 2017
	Submit Club Membership Forms	Accepting new members is an ongoing activity! Complete and submit Membership forms to <b>SIA and GWR</b>	Ensure treasurer completes forms for new
	to SIA and GWR (5008 & 5010)	Download forms from http://www.goldenwestregion.org/	member and member changes
		Complete SIA forms online or download forms from www.soroptimist.org	
	Submit Program Focus Reports	Submitting Program Focus Reports is an ongoing activity! Refer to July for details.	Due online by April 15
	Submit Soroptimist Celebrating Success	Soroptimist Celebrating Success recognizes outstanding club projects and best practices in each of the four areas of the SIA	Send to SCS Chair
	-	Strategic Plan: program, members, public awareness, and fundraising. Get forms and instructions at <b>GWR website</b> <u>http://www.goldenwestregion.org/</u>	DONA Linda Nixon September 30, 2016
		Submit projects or practices started or completed during the 2015-2016 calendar year	

GWR Club President's 2016-2017 Club Activity Checklist • Revised July 2016

Soroptimist Founders Day - October 3	Download <b>Soroptimist 101</b> from <u>www.soroptimist.org</u> for information about the founding and history of the organization:	Celebrate with a special event that highlights SIA's mission of improving the lives of women and girls
Dream It, Be It Program for Girls	Begin collecting a community assessment regarding Dream It, Be It Program for Girls, get Toolkit at <b>SIA website</b> <u>www.soroptimist.org</u>	Be prepared to report your progress by February 15, 2017
United Nations Day - October 24 <sup>th</sup>	Soroptimist International has consultative status with the United Nations' Economic and Social Council (ECOSOC), which oversees U.N. activities and policies promoting human rights. Soroptimist representatives advocate for the Soroptimist mission of improving the lives of women and girls.	
	Learn more: http://www.soroptimistinternational.org/si-at-the-un	
Attend District Fall Meeting	Consult your district fall meeting call for meeting agenda and driving directions <b>District 1</b> - October 7-8, 2016 <b>District 2</b> - October 21-22, 2016 <b>District 3</b> - October 28-29, 2016 <b>District 4</b> - October 14-15, 2016	Have fun attending with your club members, lea a lot and don't forget to report back to your club
Federal and State Tax Returns	Download <u>Club Treasurer Guidelines</u> from the <u>www.soroptimist.org</u> : Download <u>Club Treasurer's Handbook</u> from the GWR website in the Print Shop Section: <u>http://www.goldenwestregion.org/</u>	Your club treasurer should be working on ta returns, which are due t the IRS and your state b November 15
Submit Club Membership Forms to SIA and GWR (5008 & 5010)	Accepting new members is an ongoing activity! Complete and submit Membership forms to <b>SIA and GWR</b> Download forms from <b>GWR website</b> <u>http://www.goldenwestregion.org/</u>	Ensure treasurer completes forms for new member and member changes
	Complete SIA forms online or download forms from www.soroptimist.org	
Submit Program Focus Reports	Submitting Program Focus Reports is an ongoing activity! Refer to July for details.	Due online by April 15

101	VEMBER		
	Federal and State Tax Returns	Download <u>Club Treasurer Guidelines</u> from the <u>www.soroptimist.org</u> :	Check with your club treasurer—tax returns are due to the IRS and your
	IRS Form 990	Download <u>Club Treasurer's Handbook</u> from the GWR website <u>http://www.goldenwestregion.org/</u>	state by November 15
	Live Your Dream applications due to club	Receive completed applications: Live Your Dream Committee should be arranging for judging of applications by local non- Soroptimist judges	IMPORTANT DATES: Live Your Dream applications to Club- November 15
			Live Your Dream Winner to GWR District Committee Rep.— February 1
	Dream It, Be It Program for Girls	Continue collecting a community assessment regarding Dream It Be It Program for Girls.	Be prepared to report your project by February 15, 2017
]	Participate in Soroptimist Workplace Campaign to End Domestic Violence	Download information on this program from <u>www.soroptimist.org</u> : Soroptimist Workplace Campaign to End Domestic Violence	Coincides with International Day for the Elimination of Violence Against Women - November 25
]	Submit Club Membership Forms to SIA and GWR (5008 & 5010)	Accepting new members is an ongoing activity! Complete and submit Membership forms to <b>SIA and GWR</b> Download forms from <u>http://www.goldenwestregion.org/</u>	Ensure treasurer completes forms for new member and member changes
	Submit Program Focus Reports	Submitting Program Focus Reports is an ongoing activity! Refer to July for details.	Due online by April 15
	Nominate candidates for the 2017-2019 GWR Nominating Committee	In 2016, Clubs will receive a request for nominations for candidates for the 2017-2019 GWR Nominating Committee from the current GWR Nominating Committee Coordinator by Nov 1, 2016	Club is responsible for submitting nominations I December 1

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DECEMBER

Soroptimist International President's Appeal— December 10	Observe Human Rights Day (also Soroptimist International Day) on December 10 by donating to the SI President's Appeal. For more information on this special day go to the <b>United Nations</b> <b>website</b> : <u>http://www.un.org/rights/</u> December 10 President's Appeal – donations will be made directly to SIA for this project. From the money collected, grants	Plan a program to share information on the SI President's Appeal project Treasurer sends funds collected or budgeted to
Submit Club Membership Forms	will be given to clubs that help develop solar energy projects in rural areas. Go to <b>SIA website</b> <u>www.soroptimist.org</u> for more information Accepting new members is an ongoing activity! Complete and submit Membership forms to <b>SIA and GWR</b>	SIA Ensure treasurer completes forms for new
 to SIA and GWR (5008 & 5010) Submit Program	Complete and submit Membership forms to SIA and GWR         Download forms from         http://www.goldenwestregion.org/         Submitting Program Focus Reports is an ongoing activity!	completes forms for new member and member changes Due online by April 15
Focus Reports	Refer to July for details.	

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	Soroptimists STOP Trafficking Awareness-Raising Project	Download information on how your club can participate in the STOP Trafficking Awareness-Raising Project from <u>www.soroptimist.org</u> :	Coincides with National Day of Human Trafficking Awareness on January 11
	Remind Treasurer to prepare IRS form 1099 for your Live Your Dream winners	Download <u>Club Treasurer's Handbook</u> from the GWR Member Services/Document Library at the GWR website <u>http://www.goldenwestregion.org/</u>	Send to Live Your Dream recipient(s) no later than January 31, if the amount of cash award was \$600 or more
	Submit club Live Your Dream winner to GWR District Live Your Dream Committee Rep.	Use GWR LIVE YOUR DREAM transmittal form available from the <b>Golden West Region website</b> Print Shop <u>http://www.goldenwestregion.org/</u>	IMPORTANT DATES: Live Your Dream Winner to GWR District Committee Rep— February 1
	Dream It, Be It Program for Girls	Review Curriculum Guide by SIA for more information go to GWR website <u>http://www.goldenwestregion.org/</u>	Guide posted on GWR website January 15
	Mid-Year Club Budget Review	Ask club finance/budget committee & treasurer to prepare and present a mid-year budget review	During the month of January
	Submit Club Membership Forms to SIA and GWR (5008 & 5010)	Accepting new members is an ongoing activity! Complete and submit Membership forms to <b>SIA and GWR</b> Download forms from <u>http://www.goldenwestregion.org/</u>	Ensure treasurer completes forms for new member and member changes

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	Submit club Live Your Dream winner to GWR District Live Your Dream	Use GWR LIVE YOUR DREAM transmittal form available from the <b>Golden West Region website</b> Print Shop <u>http://www.goldenwestregion.org/</u>	Live Your Dream Winner to GWR District Committee Rep.— February 1
_	Committee Rep.	Deview ship hadrens for a serie sting a second it is former time.	
	Form club nominating committee	Review club bylaws for nominating committee formation procedures	
]	Prepare Soroptimist Club Grant for Women and Girls	Consider submitting an application for financial assistance in starting up or continuing projects in your local community. Grants are awarded in \$500 increments ranging from \$500 to \$10,000. Get information and application forms from <a href="http://www.soroptimist.org">www.soroptimist.org</a> :	Take advantage of this opportunity! Form a committee to prepare you club grant application. Applications were due March 15
]	Plan for Soroptimist Saturday of Service—First Saturday in March	Submit a Program Focus Report for Saturday of Service projects, refer to July for details.	Join Soroptimists around the world by participating in a service project on Saturday, March 4, 2017
]	Dream It, Be It Program for Girls	Use Dream it, Be It progress report form available from the <b>SIA</b> <b>Website</b> : <u>www.soroptimist.org</u>	Progress Report to GWF District Committee Rep February 15
]	Submit Club Membership Forms to SIA and GWR (5008 & 5010)	Accepting new members is an ongoing activity! Complete and submit Membership forms to <b>SIA and GWR</b> Download forms from <u>http://www.goldenwestregion.org/</u>	Ensure treasurer completes forms for new member and member changes
]	Submit Program Focus Reports	Submitting Program Focus Reports is an ongoing activity! Refer to July for details.	Due online by April 15

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	Program Focus	If you have not submitted Program Focus Reports on your	Reports submitted onlin
	Reports	programs this year, now is the time! To enter your Program Focus Report please visit	by April 15 will be considered for GWR
		http://reports.soroptimistinternational.org. As this is a secure	Program Awards at
		section of the SI website, you will need the SIA Username and Password to gain entry.	Spring Conference
		USERNAME: sia PASSWORD: philadelphia	
		Instructions for completing and submitting Program Focus Reports are available on the <b>Golden West Region website</b> http://www.goldenwestregion.org/	
	Participate in the Soroptimist Saturday of Service	Join Soroptimists around the world by participating in a service project! Don't forget to report on your project:	Saturday, March 4, 201
_	Receive Call to GWR	All clubs will receive the spring conference call 60 days prior to	Read and discuss the
	Spring Conference	the date of the spring conference— GWR Spring Conference	official call to conference and encourage membe
		Conference call materials will also available for download on the	attendance. Send in
		GWR Spring Conference website at www.gwrspringconference.org	conference registration fees by the established
		www.gwispringconterence.org	deadline.
7	Submit Soroptimist	See February for program information.	Send Application to SIA
	Club Grant Proposal		<u>BEFORE</u> March 15
	Host Live Your Dream Event on	Plan a program to honor club Live Your Dream and New Girl	Don't forget to publicize
	March 8,	Award recipients.	your program!
	International Women's Day		
	Submit Club	Accepting new members is an ongoing activity!	Ensure treasurer
	Membership Forms to SIA and GWR	Complete and submit Membership forms to <b>SIA and GWR</b> Download forms from	completes forms for ne member and member
	(5008 & 5010)	http://www.goldenwestregion.org/	changes
_	Submit Program	Submitting Program Focus Reports is an ongoing activity!	Due online by April 15
	Focus Reports	Refer to July for details.	

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	Program Focus Reports	If your club has been preparing reports as projects are completed, you will already have met this deadline! Instructions for completing and submitting Program Focus Reports are available on the <b>Golden West Region website</b> <u>http://www.goldenwestregion.org/</u>	Reports submitted onlin by April 15 will be considered for GWR Program Awards at Spring Conference
	Register for Spring Conference	Consult your Conference Call for all information concerning registration and other activities for which forms must be submitted	Register delegates and club members before deadline specified in conference call
	Elect club officers, board members, delegates & alternates	Check procedures outlined in your club bylaws for election of club officers, board members, delegates and alternate delegates	Include elections on you agenda
	Order Past President's Pin	Order this special pin now from SIA so you will be able to present it to your outgoing president at the end of her year. You can order online from <u>www.soroptimist.org</u>	Order pin from SIA
	Club budget	Check club bylaws for any procedures related to budget development and adoption	Make sure your club finance or budget committee prepares and submits a budget for the coming year
	Submit Club Membership Forms to SIA and GWR (5008 & 5010)	Accepting new members is an ongoing activity! Complete and submit Membership forms to <b>SIA and GWR</b> Download forms from <u>http://www.goldenwestregion.org/</u>	Ensure treasurer completes forms for new member and member changes
	Dream It Be It Program for Girls	Using the resources released by SIA in January 2015, conduct your club's project, evaluate the outcomes and start planning for next year	

SIA-Founders Pennies - \$5.76 per member	Most clubs make this contribution along with their dues. Some clubs wait and make this contribution to SIA in May. Direct Link: Founders Pennies	Make your contribution <u>BEFORE</u> May 31
Receive GWR Club Information Update Form for 2017-2018	Submit club President and club Treasurer contact information form sent to you by the GWR Secretary in May.	Complete and return to GWR Secretary <u>BEFORE</u> June 1
	Forms will also be available for download on the <b>Golden West</b> <b>Region website</b> <u>http://www.goldenwestregion.org/</u>	
Prepared club budget	Same budgets can be found on the SIA website	Include funds for memb attendance at Soroptimi events
Receive GWR Dues Invoice for 2017- 2018	All clubs will receive the annual GWR dues invoice from the GWR Secretary by May 1.	Pay <u>BEFORE</u> July 1
	Forms will also be available for download on the <b>Golden West</b> Region website <u>http://www.goldenwestregion.org/</u>	
Receive SIA Dues Invoice for 2016- 2017	All clubs will receive the annual SIA dues invoice by mail from SIA Headquarters between May 1-15	Pay <u>BEFORE</u> July 1
Receive SIA Form 200 – Report of New Club Officers for	All clubs will receive <i>Form 200</i> from SIA to submit new club officers between May 1-15.	Submit completed form SIA <u>BEFORE</u> July 1
2016-2017	Form 200 can be downloaded from www.soroptimist.org:	
Make Club Contribution to SIA Programs	Support the SIA mission by contributing to programs that help women in all countries of our federation	Club contributions must be <u>RECEIVED</u> by SIA I May 31 to be recognize
Programs	Forms are available from the <u>www.soroptimist.org</u> :	for Club Giving in the current club year
Dream It Be It Program for Girls	SIA will release details of Dream It Be it financial awards for girls (The first year for the financial award will be 2015-2016)	

Conference	Attend the GWR Spring Conference!	Come, learn, celebrate
		and enjoy!
Pay GWR Annual Dues	You received the GWR invoice in May—now is the time to pay! Refer to July for details.	Submit <u>BEFORE</u> July 1
Pay SIA Dues Annual Dues and submit updated club roster	You received the SIA invoice in May—now is the time to pay! You also received a club roster from SIA to update and return. Refer to July for details.	Make dues payment and updated club roster are sent to SIA <u>BEFORE</u> July 1
		Send copy of SIA dues invoice and updated club roster with region dues to GWR Treasurer <u>BEFOR</u> July 1
Installation of new club officers	Plan a special celebration to assure that your new club officers get off to a great start	Use this link as a guide for planning your own fun, inspirational installation!
	Direct Link: Installation of Club Officers	Report new officers to SI and GWR by July 1 <sup>st</sup>
Facilitate transition of new club officers and committee chairs	Share all the presidential secrets you have learned this year with your successor!	Provide transition materials and other critic info to new officers and committee chairs
Evaluate club projects	Take the time to evaluate club activities for effectiveness and to ensure that all projects and programs are consistent with SIA's mission and goals.	Celebrate the beginning a successful Soroptimist year!
	Evaluation forms are available for download from www.soroptimist.org:	
	Also take the time to survey your club members for improvements to your club.	
Submit Soroptimist Celebrating Success	Soroptimist Celebrating Success recognizes outstanding club projects and best practices in each of the four areas of the SIA Strategic Plan: program, members, public awareness, and fundraising. Get forms and instructions at <b>GWR website</b> <u>http://www.goldenwestregion.org/</u>	Send to SCS Chair DONA Linda Nixon <mark>September 30, 2016</mark>
	Submit projects or practices started or completed during the 2014-2015 calendar year	

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